

Discover Templates

Discover Templates

Help you understand your end users' needs and wants to identify opportunities for the innovation use case.

Keystone Activities

User research, synthesize, formulate problem statement and begin understanding the architecture constraints and needs of the solution.

Preparation

People: Include end users, key stakeholders during the research.

Place: Make sure research takes place in the environment of the users.

Dedicate a creative space and walls for synthesis.

How-To

Conduct user research to get insights on end users' pain points and opportunities for improvement.

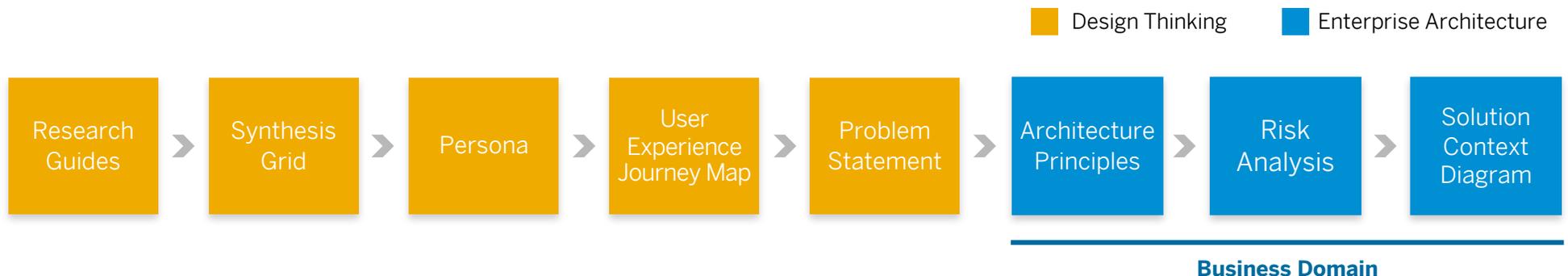


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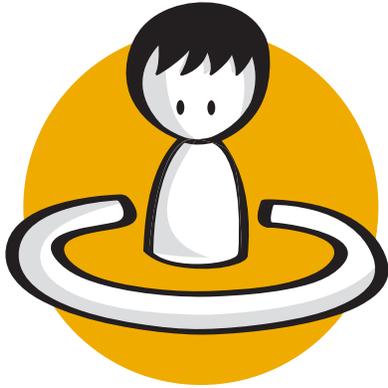
Research Guides

Instructions | Template | Example | Protocol

A workbook and interview script to assist with onsite observation & interviews with end-users for the project.



Discover The Problem Space 360° Research

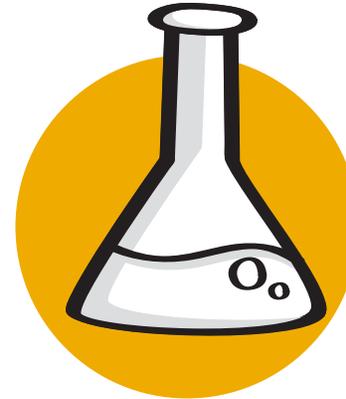


Conduct field research

(primary)

Talk to End-Users

Talk to Stakeholders and Experts



Conduct other research

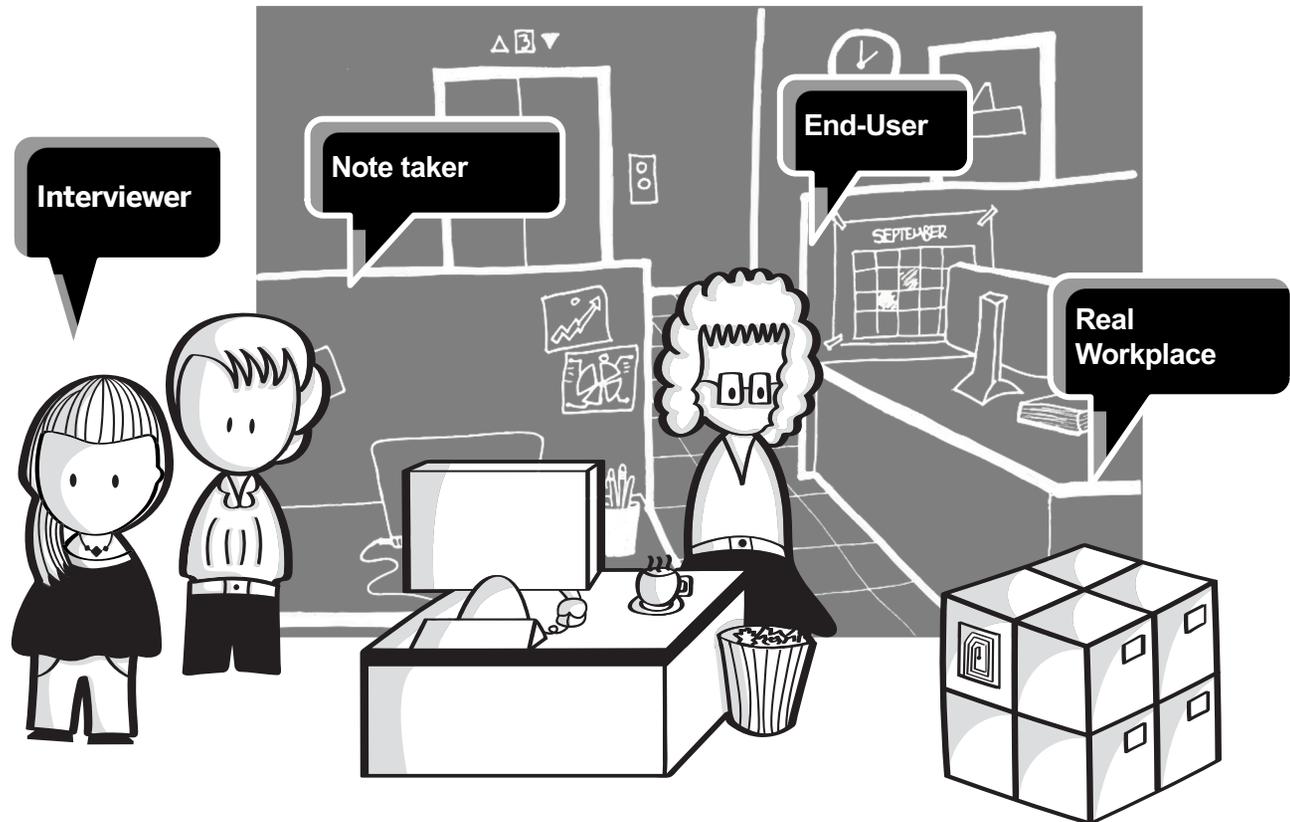
(secondary)

Look at thought leaders / analysts

Consider adjacent, analogous and other research

Conducting Interviews

- Pair up for interviews:
interviewer and note taker
- Listen
- Be curious and ask why
- Be aware of body language
(your own and interviewee)
- Take photos
- Collect artifacts
- Write down your impressions



How you ask matters

Ask open-ended questions



Closed ended: results in a single word answer



Open-ended: 'what', 'why', 'how', 'when', 'where', 'who'

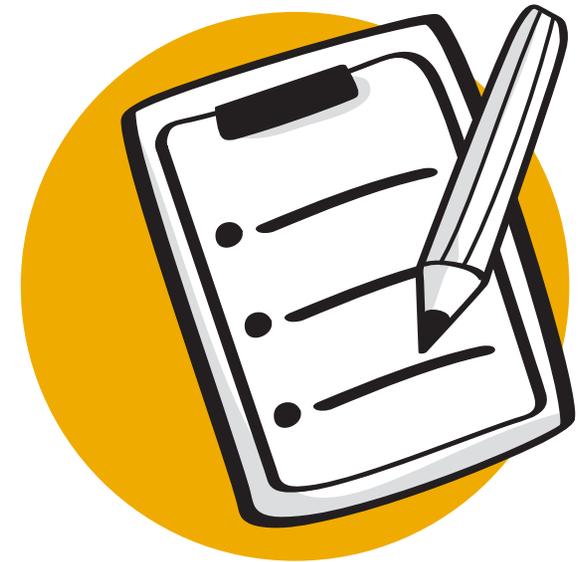
Do not ask leading questions



Do you like getting coffee?



How is the getting coffee experience?

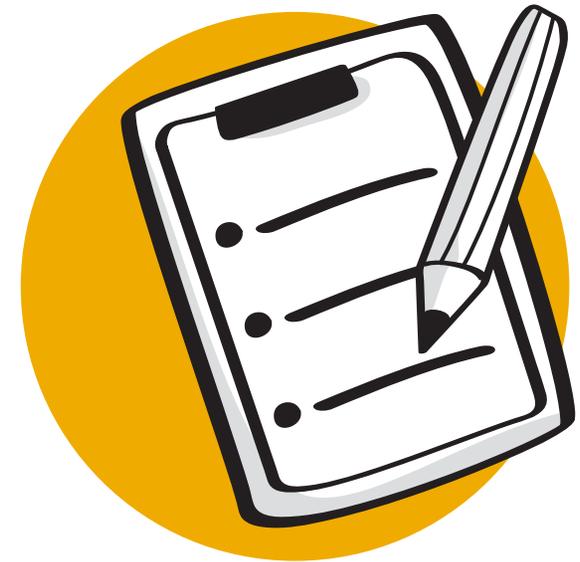


Interview Guide

Pre-Visit Workbook

Workbook to send upfront the onsite observation & interview to the end-users for collecting a first feeling:

- Introduction
- Your Routine
- Best Day/Worst Day
- Tips & Tricks



Pre-Visit Workbook

Hello!

Thank you for participating in our research. The purpose of our meeting is to gain insights for:

Your scenario / use case _____

Please fill out this workbook. Do not worry about making it “pretty!” It will be of great help for our meeting.

I look forward to chatting with you !

Introduction (2 min)

Please tell us a bit about you below.

My name is *name* _____

And I work in *business unit, department* _____

My current position is *job title* _____

and I have been doing it for _____ years.

My main responsibilities include

Main responsibilities _____



Checklist (20 min max)

- Introduction (2 min)
- Your Routine (5 min)
- Best Day/Worst Day (6 min)
- Tips & Tricks (5 min)



Bonus points if you **help capture** the following **though photos**:

- Work environment
- Helpful tools, things, people
- Hindering actions, protocols

Draw yourself and your team here!

Your Routine (5 min)

Please **give us an idea of how you spend your day.**

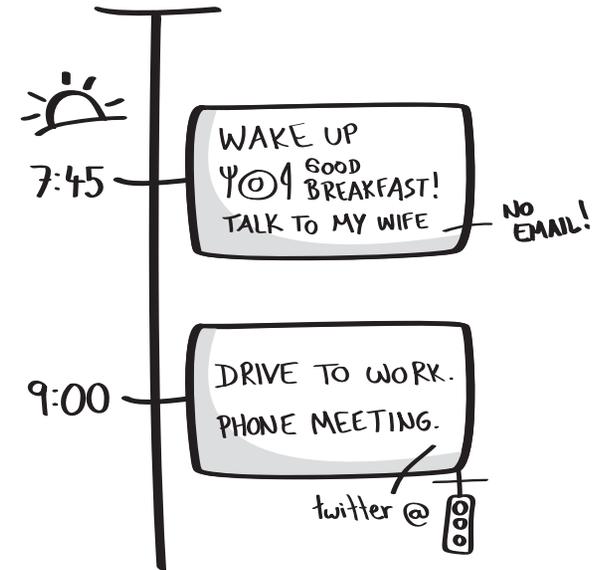
What kinds of **activities** do you perform for your job?

How much **time** is spent each day doing each activity?

Please also include the following

- software, devices, tools/materials used
- people who are involved and/or talked to

Rough sketches and keywords are great, since you will have the chance to verbally elaborate when we meet.



This is just an example ... No timeline is needed!

A few things I do...

Who I talk to...

How long it takes...

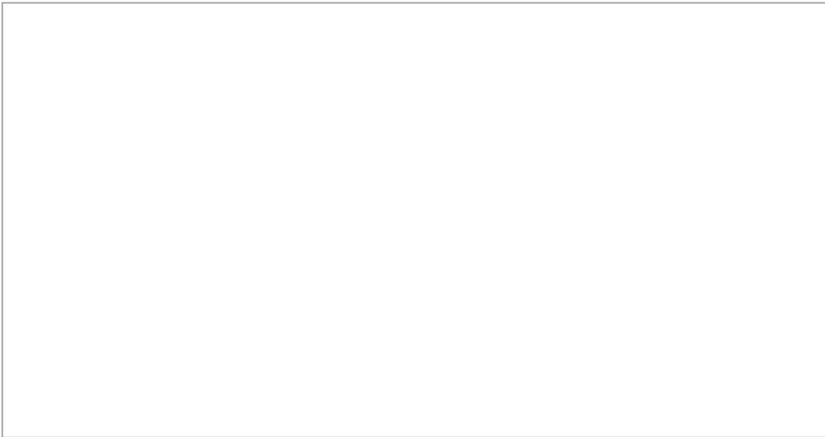
Things I use...

Your routine description

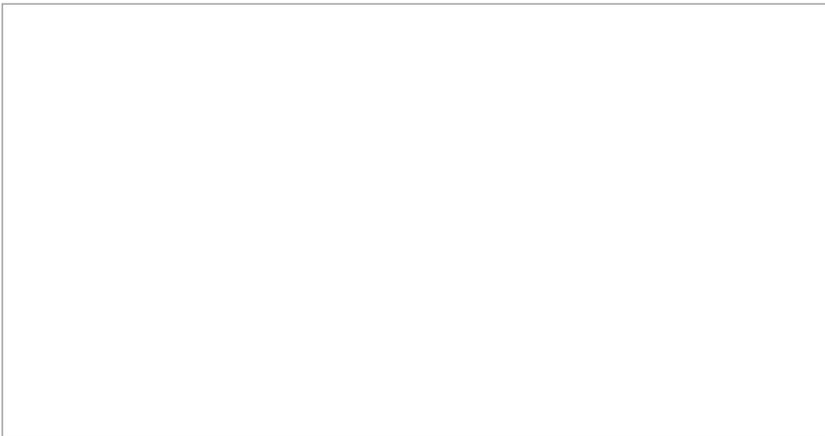
Your Best Days (3 min)

Take a moment to recall **days that feel great** on the job

What happened?



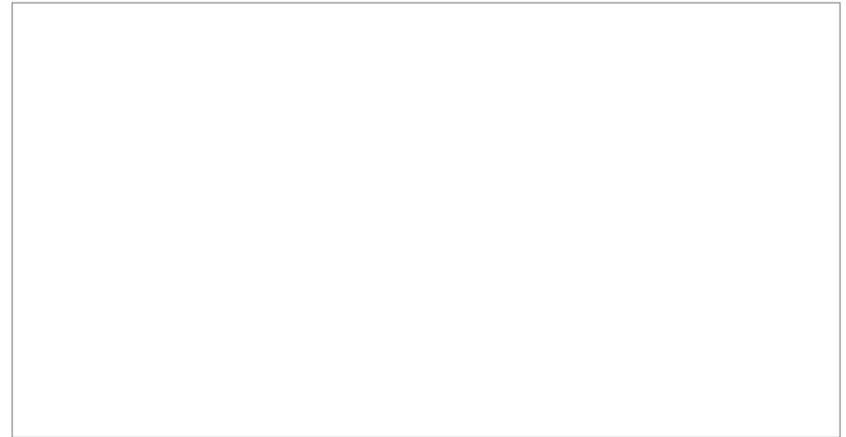
What things (tools, protocols, or people) supported you?



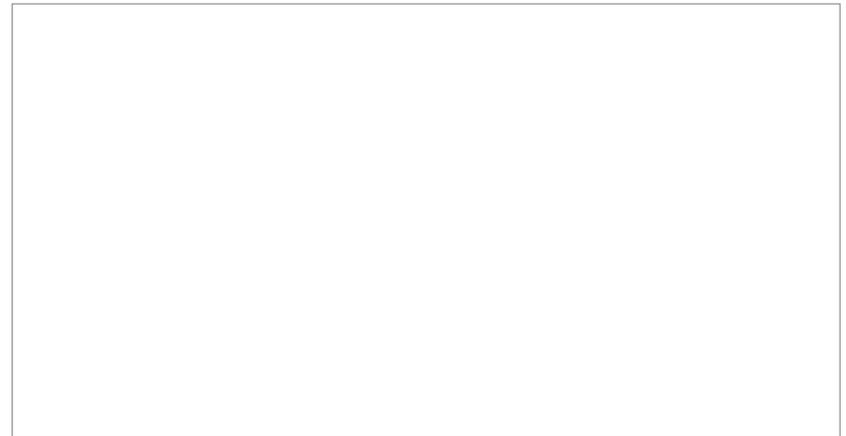
Your Worst Days (3 min)

Take a moment to recall **not-so-great days** on the job

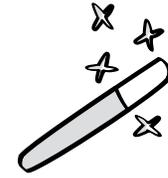
What happened?



What things (tools, protocols, or people) supported you?



Tips & Tricks (5 min)



What are **5 things that you would tell someone new** to your group **to help them succeed?** (*This does not have to be related to applications or software*)

1) _____

2) _____

3) _____

4) _____

5) _____

Thank you!

Please put here any notes (highlights, concerns) that you would like to discuss during our upcoming meeting.



Interview Guide Overview

Interview script guide to support the interviewer & the note taker during the end-user observation & interview:

- Introduction
- Personal Introduction
- Interview & Observation
 - Key tasks
 - Processes
 - Pain Points and room for improvement
 - User Journey for the processes
- Backup Questions for Interview
- Notes

Interview Guide

Introduction (5-10 min)

- We are Designers of Your company
- Project goal: _____
- We would like to capture your insights, understand the pain points and current situation.

“Don’t worry. This is not a test. We are not here to critique your way of working, but rather to fully understand your work and how you do it. We want to gain a general understanding of your task flows and all of the tools and resources that you use in relation to this scenario in your daily work.

Please be open and honest! It is very important for us to get the real picture of your everyday tasks.”

- We are interested in any problems or unmet needs you have in relation with this scenario.
- This interview will take about max 60-90 minutes. You can have a break or stop the interview at any time.
- Is it alright with you for us to take pictures / recording of your work environment?
- Could we have screen shots printed out?
- The information that we gather in our session will be fully anonymous and confidential.

Personal Introduction (10 min)



Interviewee Name: Name

Department: Department

Date & Interviewer: Date & Interviewer

What is your official job title? Answer

How long have you worked in this role? Answer

Which software do you use? Answer

Which additional tools do you use?

- | | | |
|--|--|---------------------------------------|
| <input type="checkbox"/> Telephone | <input type="checkbox"/> Internal Guidelines | <input type="checkbox"/> Copy machine |
| <input type="checkbox"/> Internal Guidelines | <input type="checkbox"/> Books, Lists, Manuals | <input type="checkbox"/> Printer |
| <input type="checkbox"/> Copy machine | <input type="checkbox"/> Online (Intranet) | <input type="checkbox"/> Print |
| <input type="checkbox"/> Mail | <input type="checkbox"/> Files, Archives etc. | |

Further description of the workplace:

Equipment, hardware (e.g. number and size of screens), & tools are used. Take a picture/draw a sketch the user's work environment. Look out for sticky notes, folders, filing baskets, and describe how they are used.



Interview & Observation (30-45 min)

Note: Screenshots!

Key tasks (= use case)

Imagine that we were new colleagues, who are about to take on the same tasks as you in the future. **Show and tell us**, how you work so that we don't struggle with the same difficulties and how your workaround is.

Which are your **main (E2E) processes** in your daily / regular business?

- 1 *answer* _____
- 2 *answer* _____
- 3 *answer* _____
- 4 *answer* _____
- 5 *answer* _____

Who are your **customer / stakeholders** (internally / externally)?

Are you **working in a team**?



Please show us the _____ process

- What is the trigger of starting this process / using this report? (=why?)

- Which are your most important tasks or information?

- Who is your customer (internally / externally)?

- Are there any recurring tasks? If yes, which ones?

- How often and when do these tasks occur (e.g. weekly, monthly, periodicity)?



Pain Points and room for improvement

- Do you recognize any bottlenecks (e.g. communication)?
- Do you have further proposals for improvements?
- What do you like in current solution
- Is there anything else to tell us?
- Individual discussion based on pre-survey



User Journey for the _____ process (30 min)

A large, empty rectangular box with a thin black border, intended for drawing a user journey map.



Please show us the _____ process

- What is the trigger of starting this process / using this report? (=why?)
- Which are your most important tasks or information?
- Who is your customer (internally / externally)?
- Are there any recurring tasks? If yes, which ones?
- How often and when do these tasks occur (e.g. weekly, monthly, periodicity)?



Pain Points and room for improvement

- Do you recognize any bottlenecks (e.g. communication)?
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User Journey for the _____ process (30 min)

A large, empty rectangular box with a thin black border, intended for drawing a user journey map.



Backup Questions for Interview

Per key task:

Activity

- How do you know when to start the task?
- (e.g. by work-lists, messages, email, telephone etc.)?
- Which concrete steps do you have to make in order to perform this task?
- How do you know you are done?
- Errors handling?

Information Flow & Exchange

- Which concrete information do you need in order to execute each of these steps?
- Wherefrom (from whom) and in which form do you receive this information, e.g. which kind of reports, documents, access to specific databases or artifacts?
- Is the information you get sufficient? If no: which further information do you need to fulfill your task?

Decision Making

- Which decisions have to be taken in context of these tasks?
- How do you take the decision?
- Which decisions can be taken by yourself?
- Which decision needs to be taken by someone else?

Communication with other people / parties etc.

- Which additional persons (roles - e.g. tax payer, court) do you need to fulfill these tasks? What are these persons contributing then?
- How do you communicate with each of these process members (phone, eMail, letter, fax, face to face)?
- How (and where) do you document this?
- To whom do you need to transfer this information (e.g. status)?

General

- How do you ensure you fulfill your tasks in time?
- How do you document your work (e.g. notes)?
- What happens when you are not in the office?
- Career Path?

Synthesis Grid

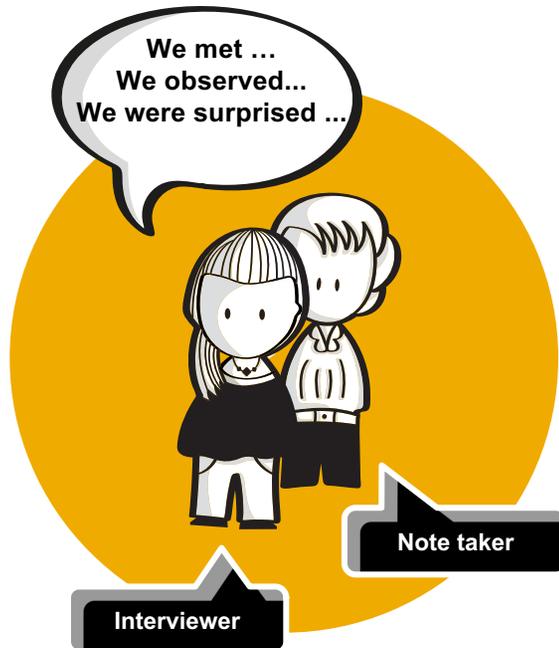
Instructions | Template | Example | Protocol

Unpack thoughts and experiences into tangible and visual pieces of information. Synthesize data into interesting findings and create insights which will be useful for creating solutions.

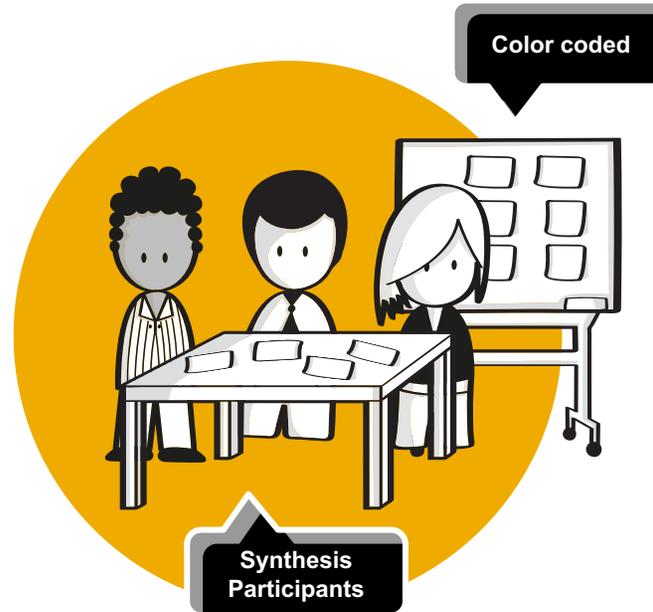


Synthesis Grid

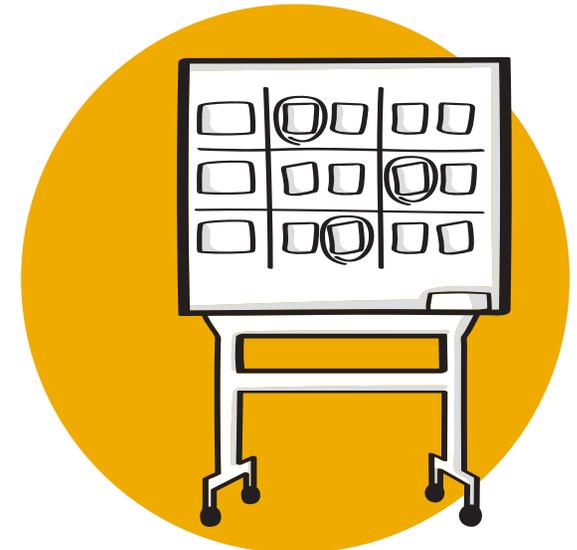
Unpack thoughts and experiences into tangible and visual pieces of information



Share the stories and characteristics of users

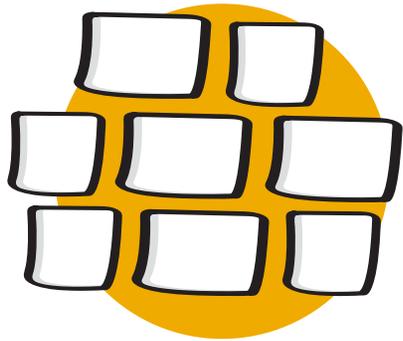


Capture data points of the stories



Cluster & Highlight the key insights

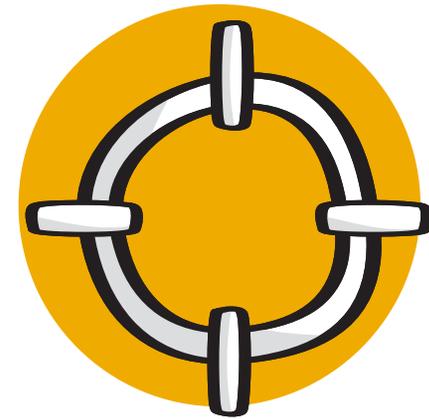
Discover **Synthesis**



Mass of unstructured information
Result of research interviews



Make sense of the data
Synthesis



Define a clear problem statement as focus for design
Goal

How to debrief

To begin the synthesis grid, cover the walls with post it notes consisting of data points.

below are topics to consider:

- Role introduction
- Daily routine
- Best day/worst day
- Tips & Tricks for new employee
- Work environment
- Helpful tools, things, people
- Hindering actions, protocol
- How long does it take
- Who I talk to
- Extreme experience
- Story about last time
- Errors handling
- Career Path
- ...



Synthesis Grid Instructions



Duration
30-180 minutes



Number of Participants
3-5 participants



Why & What

Unpack thoughts and experiences into tangible and visual pieces of information.

Get the team on the same level of knowledge about the research findings.

Synthesize data into interesting findings and create insights which will be useful for creating respective solutions.

Inspire the team to move toward identifying meaningful needs of people and insights.



How to use it

Outline the research approach (e.g. interviews), methods, and circumstances at the beginning of the session to summarize the effort.

2. Round the table: Share the stories and characteristics of users with your team mates.

Images, movies, anecdotes, and quotes are useful to support your story and engage the audience. Encourage the audience to ask questions.

3. Each team mate capture data points of that stories and stick them to the synthesis grid on the wall. 4. Cluster the data and define headlines for the different topics

5. Highlight the key insights with Golden Nugget frames.



Tips & Tricks

For the storytelling you can think about:

- . Role introduction
- . Daily routine
- . Best day/worst day
- . Tips & Tricks for new employee
- . Work environment
- . Helpful tools, things, people
- . Hindering actions, protocol
- . How long does it take
- . Who I talk to
- . Extreme experience
- . Story about last time
- . Errors handling
- . Career Path ...

Synthesis Grid Example

The synthesis grid is organized into several columns and rows of sticky notes. Key sections include:

- User Characteristics:** Notes about a 29-year-old former champion who likes the forklift with the PC, uses a private phone, and has a 'Can Do Attitude'.
- Goals & Needs:** Notes about the main task of moving things from A to B, the customer's desire to deliver and source to the factory, and the need for a scanner to verify declarations.
- Pain Points:** Notes about SAP issues, time spent relabeling (45 min for 20 pallets), and the frustration of a scanner that can't read labels.
- Tasks:** Notes about starting the day with a pulse meeting, a check-list, and the need for a scanner to support the production line.
- Label:** Notes about relabeling tasks, SAP labels, and the need for a scanner to read labels.
- Process:** Notes about performing simple warehouse tasks and the complexity of the forklift process.
- Scanners:** Notes about the scanner not reading labels and the need for a scanner that can read labels.
- Team:** Notes about the team of 4/10 people, the need for a scanner to support the production line, and the need for a scanner to read labels.
- Office Desktop:** Notes about the need for a scanner to support the production line and the need for a scanner to read labels.
- System:** Notes about the need for a scanner to support the production line and the need for a scanner to read labels.

Synthesis Grid **Template**

User Characteristics	
Goals & Needs	
Pain Points	
Most Surprising Facts	
Ideas	

Persona

Instructions | Template | Example | Protocol

Archetype of your users from research interviews to guide future design decisions.

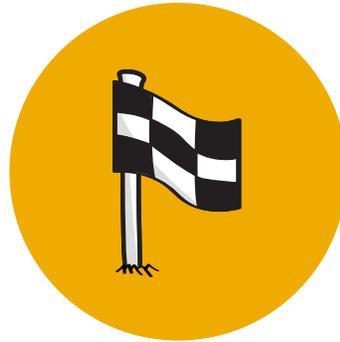


Persona

Archetype created to represent goals and behaviors from user research



What are the typical characteristics that best reflect the users ?
(name, age, role, educational background)



What goals, tasks does the persona have?



**What does she like?
About what is she frustrated?**

Persona Instructions



Duration
15-30 minutes



Number of Participants
3-5 participants



Why & What

Archetype of your users from research interviews.

Considering Personas helps to guide future design decisions. They give a human face to an otherwise abstract data.

"We work with Personas, so our developers don't develop for themselves." - SAP User Researcher

Personas are fictional characters, based on real data from your research interviews and created to represent user types and roles. They include goals, desires, tasks and limitations of the users.



How to use it

1. Include typical characteristics of users: face, name, age, educational background, etc.

In context of the design challenge:

2. Describe

- What is their role?
- What is the goal they are trying to achieve?
- What are the tasks to achieve the goal?
- What is the trigger for these tasks?
- How frequently do they complete those tasks?

3. Describe likes and dislikes.

- What does the Persona like?
- What frustrates the Persona?

4. Visualize.

- Describe or sketch what their environment looks like.



Tips & Tricks

Knowledge about the users for the use case is a prerequisite in order to leverage this tool.

Persona Example



Demographics

Activities

My Name

Michael

My Age

29

My Education

Gymnasium A-Level
Company High Education
Program

My Background

Former Craftsman
10 years at the company
was in production line

My Role

Forklift Operator

My Competencies

Power User	-----	Casual User
Proactive	-----	Reactive
Team Worker	-----	Lone Fighter
Global Focus	-----	Local Focus
Innovative	-----	Conservative

My Goal

To be efficient
Bringing Value to
Company

My Trigger

Production Order
E-Mail change request

My Tasks

Supply Production
Channels
Return goods to
basement

Frequency

Hourly

Weekly

Daily

Monthly

Work Context

Feelings

I work with ...

Channel Operator
Truck Driver

My environment looks like...

Forklift Cabin with
touchscreen
Shared Office with
desktop

What motivates me?

Wants to learn more
Feels he's part
of the company
Team Loyalty

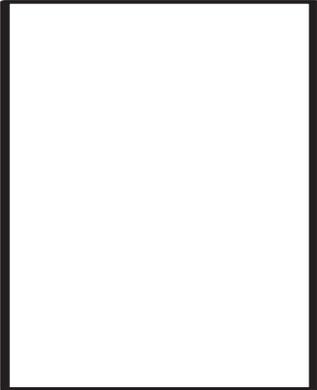
What frustrates me?

Double work
of relabelling

Too much information
on the screen
Scanner Quality

Persona Template

Demographics
Activities



My Name

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My Age

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My Education

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My Background

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My Role

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My Goal

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My Tasks

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My Competencies

Power User ———○———— Casual User

Proactive ———○———— Reactive

Team Worker ———○———— Lone Fighter

Global Focus ———○———— Local Focus

Innovative ———○———— Conservative

My Trigger

.....

.....

.....

.....

Frequency

Hourly Weekly

Daily Monthly

Work Context
Feelings

I work with ...

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My environment looks like...

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What motivates me?

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What frustrates me?

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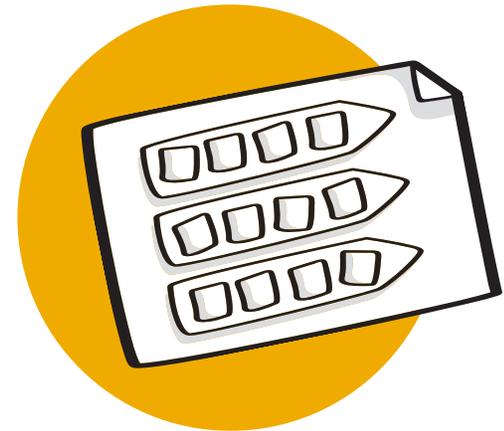
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User Experience

Journey Map

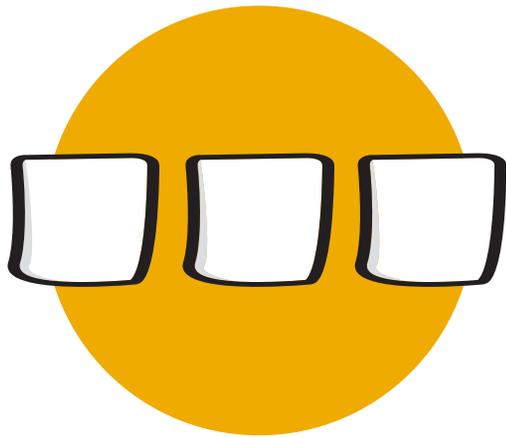
Instructions | Template | Example | Protocol

A User Experience Journey Map helps a team understand current challenges and motivations for the user over time to derive insights about the use case.



User Experience **Journey Map** (As-Is Process)

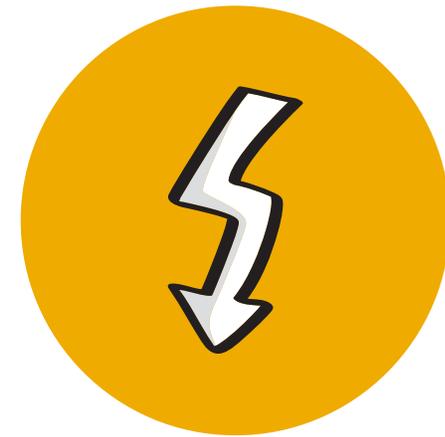
Structure your knowledge about the use case, in context of the persona and research



Write down the actions step by step



Write down the corresponding mindset and touch points



Mark the pain points and moment of truth

User Experience Journey Map **Instructions**



Duration
60-120 minutes



Number of Participants
3-5 participants



Why & What

An User Experience Journey Map allows a team to gain a common understanding about the use case through the eyes of the user over time. It helps a team to realize current user challenges and motivations, as well as to derive insights about the use case and to articulate user needs.

It is an exercise used to layout the user experience in a chronological order, step by step, on a whiteboard or on a big poster. Knowledge about the use case and the user is key to conduct this exercise.

We use this activity to capture the As-Is Process during the Discover phase.



How to use it

1. Center lane: Write down the actions step by step. What actions does the user take while trying to achieve their goal and/or fulfill their tasks?
2. Top lane: Write down the corresponding mindset. What is on the user's mind during this journey? How do they feel at each step of their journey?
3. Bottom lane: Write down the corresponding touch points. What touch points does the user have? What do they engage with while on the journey (tools, devices, conversations, other people, etc.)?
4. Mark the pain points and moments of truth.



Tips & Tricks

Moment of truth

A "moment of truth" describes a situation when something could go wrong and/or in which critical decisions have to be made.

Pain points

Situations that the user finds uncomfortable, frustrating or difficult are called "pain points".

Tip

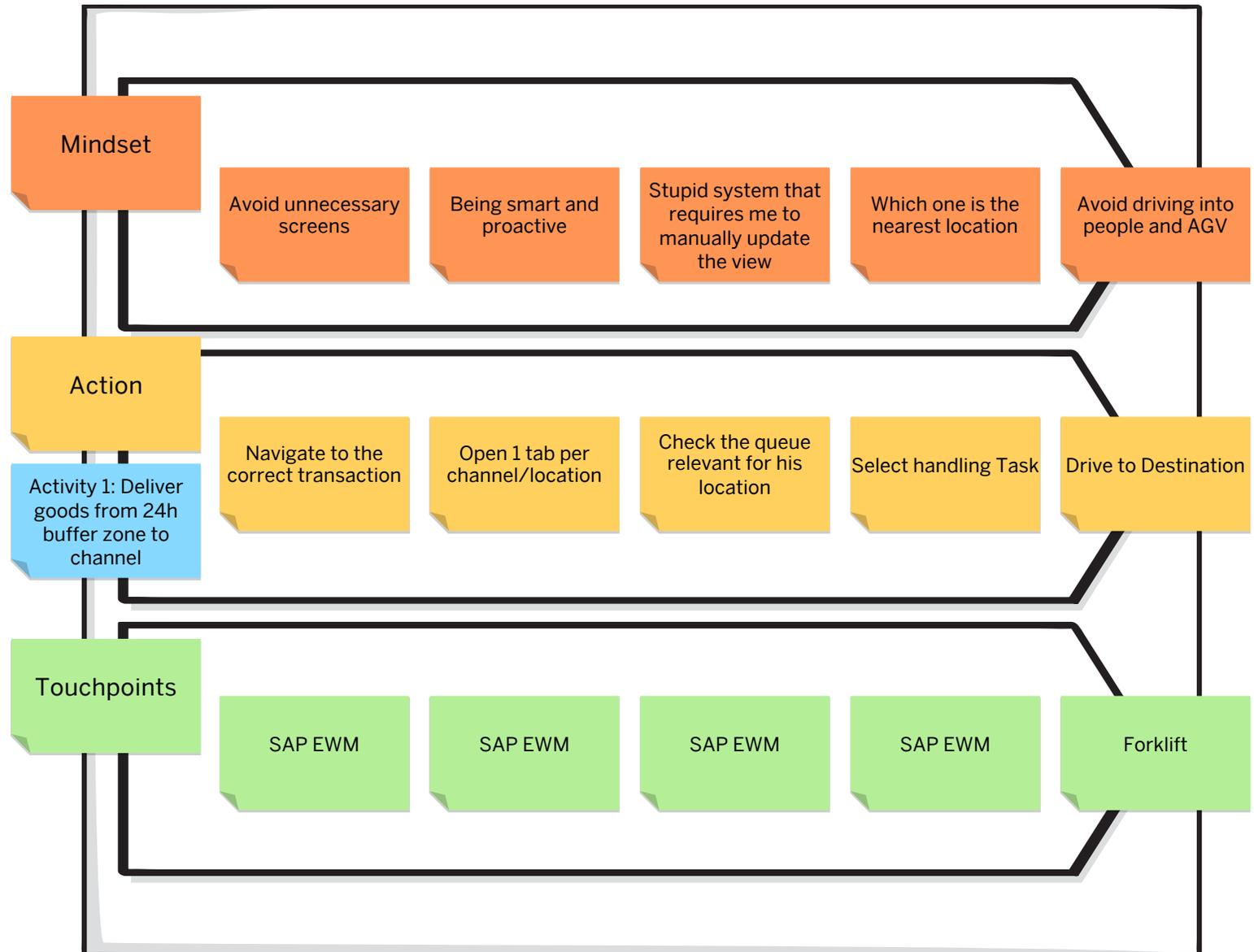
If ideas come up during the exercise, put them to an idea parking lot.

User Experience Journey Map Example

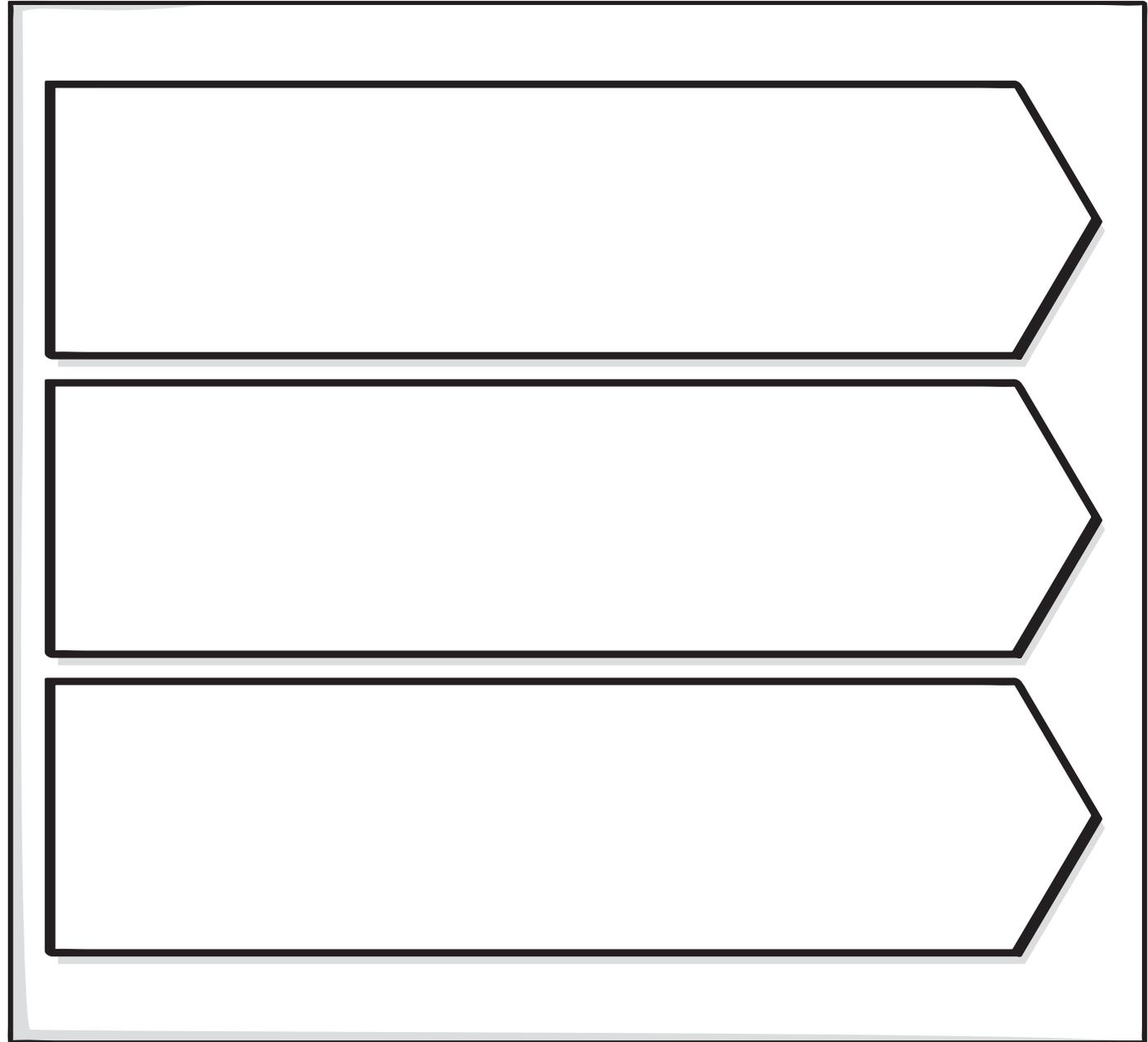
As-Is Process

Persona: Michael, Forklift Driver

Activity 1: deliver goods from 24h buffer zone to channel



User Experience Journey Map Template



Problem Statement

Instructions | Template | Example

Create a problem statement from insights learned as a "How Might We" question to help focus the problem into a statement of opportunity to generate ideas during the design phase.



Problem Statement How might we...?

Translate the team's learning about the user and the use case into questions



Start discussing what you have learned about the user and use case



What was interesting, inspiring and surprising? Why?



What are the insights and what are the most important needs?

Problem Statement Instructions

How might we...?



Duration
15-30 minutes



Number of Participants
3-5 participants



Why & What

A problem statement formed as a "How Might We" question helps focus the problem into a statement of opportunity to generate ideas during the design phase.

They serve as a basis for idea generation.

The dialogue and discussion within the team is key.

Creating "How Might We" questions is an exercise to frame questions that address the user's needs and motivations.



How to use it

1. Discuss within the team

- What have you learned about the user and their current journey?

- What was most interesting, inspiring and surprising? And why so?

- Articulate the insights, the most important user needs, limitations and conditions of success.

2. Start phrasing 3-5 "How Might We" questions by formulating the results from part 1 into questions. These questions are the basis for a first round of idea generation.



Tips & Tricks

Prior to this exercise, the team must have developed a common understanding about the user as well as the user's needs, motivations, limitations and/or criteria of success.

Problem Statement Example

How might we...?

What can we do for our Persona?

How might we help

Michael,
Forklift Driver

(Persona)

Who are you trying to help?

who

works
dynamically
(4 tabs opened)

(Conditions)

What did you learn from the UX Journey Map?

(conditions based on moment of truth and/or pain points)

to

optimize his
moving routes
(driving back & forth)

and prioritize
the production
needs

(Achievements)

What does this Persona want to achieve?

(The Personas goals and tasks)

Problem Statement **Template**

How might we...?

What can we do for our Persona?

How might we help _____ *(Persona)*
Who are you trying to help?

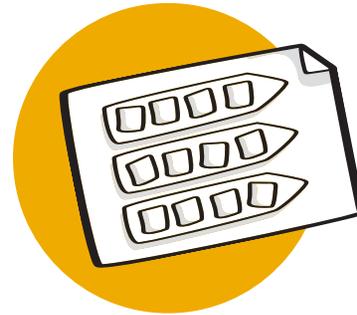
who _____ *(Conditions)*
What did you learn from the UX Journey Map?
(conditions based on moment of truth and/or pain points)

to _____ *(Achievements)*
What does this Persona want to achieve?
(The Personas goals and tasks)

Architecture

Principles

Instructions | Template | Example



Constraints and guidelines that need to be considered for developing the architecture.

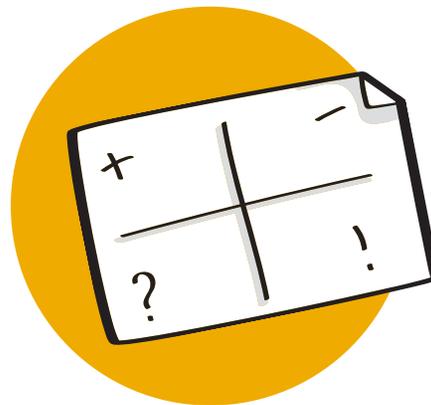
Architecture Principles

Guidelines you need to consider for developing the architecture



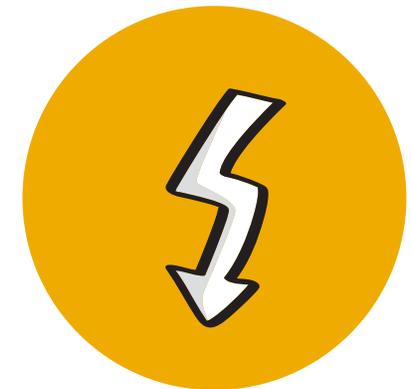
Identify principles

Do you need to consider specific standards, vendors, deployment options due to corporate strategy and market requirements?



Understand Benefits

Outline the business benefits adhering to the principle.



Identify impact

Identify the requirements for your architecture resulting from the architecture principle.

Architecture Principles Instructions



Duration
approx. 30-60 minutes



Number of Participants
- **Statement of Architecture Work**
- **Corporate Guidelines**



Why & What

Architecture Principles define the constraints your architecture must deal with. Their purpose is to serve as a guideline you need to consider when developing the architecture.

These rules or constraints being described by the Architecture Principles have been defined in the past and are valid for the entire company. They define cooperate standards and strategic decisions that should be followed for the sake of TCO, operational efficiency and compliance, for example.



How to use it

1. Identify constraints you need to take into consideration while developing the architecture.
2. Understand the business benefits when following the principles.
3. Outline the impact of following the principles to your architecture development.



Tips & Tricks

As you do not want to simply copy and paste all principles that have been defined, identify those principles that are relevant for your architectural work. For this evaluation, you take the Statement of Architecture Work, and the scope being defined there, into consideration.

Architecture Principles **Template**

Name	<i>Represents the essence of the rule. Easy to remember. Specific technology platforms should not be mentioned in the name or statement of a principle.</i>	# ID
Statement	<i>Unambiguously communicate the fundamental rule.</i>	
Rationale	<i>Highlight the business benefits of adhering to the principle using business terminology. Describe the relationship to other principles and the intentions regarding a balanced interpretation.</i>	
Implications	<i>Highlight the requirements, both for the business and IT, for carrying out the principle in terms of resources, costs, and activities. It will often be apparent that current systems, standards, or practices would be incongruent with the principle upon adoption. The impact to the business and consequences of adopting a principle should be clearly stated.</i>	

Source: TOGAF Standard, Version 9.2

Architecture Principles **Example**

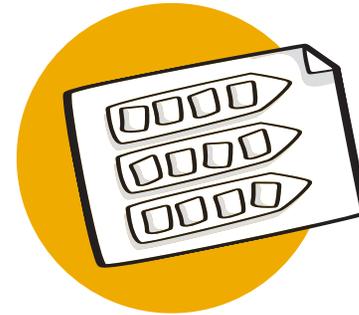
Name	Preferred IT vendor strategy	BP_020
Statement	Consider applications from Rocket Chips strategic IT partners first: Microsoft and SAP	
Rationale	Rocket Chips has long relationships to its IT partners (vendors and services) which are based on corporate contracts to ensure best license prices, interoperability and integration, maintenance and premium support (e.g., 24x7).	
Implications	<ul style="list-style-type: none"> • Organizations may not be able to select the best fit-for-purpose application from an ISV when our partners offer similar capabilities. Although, the individual cost may be competitive, the overall corporate expenditures are easier to control through our partner contracts. • Maintenance and support contracts are already in place through corporate contracts. • International availability can be ensured. 	

Source: TOGAF Standard, Version 9.2

Risk Analysis

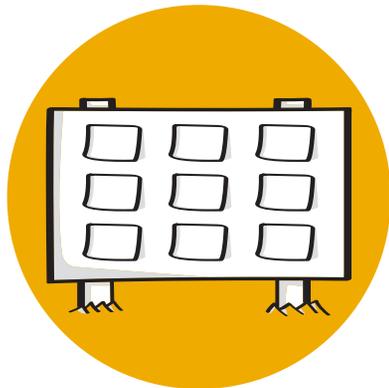
Instructions | Template | Example

Identify, classify, and mitigate risks for the architecture.



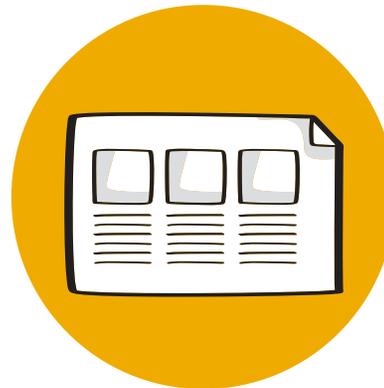
Risk Analysis

Identify, classify, and mitigate risks for the architecture



Identify Risks

Identify and classify initial risk with respect to impact to the organization/business unit.



Plan Mitigation

Identify and plan mitigation actions. Re-assesses the risk to classify the residual risk level.



Manage Risks

Execute risk mitigation and monitor execution.

Risk Analysis Instructions



Duration
Ongoing



Number of Participants

- Strategy Map
- Stakeholder Matrix
- Statement of Architecture Work



Why & What

There is always risk associated to the architecture you're developing: risks that the architecture will fail, i.e., it cannot be developed, it cannot be operated, or is not in line with other ongoing projects.



How to use it

1. Identify and briefly describe the risks. Classify them according to the categories high, medium and low (initial level of risk). Describe the impact of the initial level of risk to the architecture.

2. Define actions for mitigating the risks identified. Actions can range from an additional level of stakeholder management, to identifying reference architectures solving a similar request for architectural work.

3. Re-assess the risk level and assign the residual level of risk. Describe the impact of the residual level of risk to the architecture.



Tips & Tricks

When you think about risk, you can distinguish between two levels of risk: the *initial level of risk* and the *residual level of risk**.

You can think of three categories for risks*:

- (H)igh Risk: Significant failure of parts of the architecture project. Certain goals of the organization/ business unit will not be achieved.
- (M)oderate Risk: Noticeable failure of parts of the architecture project threatening the success of certain goals of the organization/ business unit.
- (L)ow Risk: Certain goals of the organization/ business unit will not be fully successful.

Always remain in the scope of your architecture as defined in the Statement of Architecture Work.

You can decide to only define mitigation actions for risks having an initial level of high and medium.

* Source: TOGAF Standard, Version 9.2

Risk Analysis Template

Risk ID	Risk	Initial Risk		Mitigation	Residual Risk	
		Classification	Impact		Classification	Impact
<id>	<risk description>	<initial risk classification>	<description of impact of initial risk on the organization or architecture>	<description of mitigation action>	<risk level after mitigation action>	<description of impact mitigation action and of residual risk on the organization or architecture>

Source: TOGAF Standard, Version 9.2

Risk Analysis Example

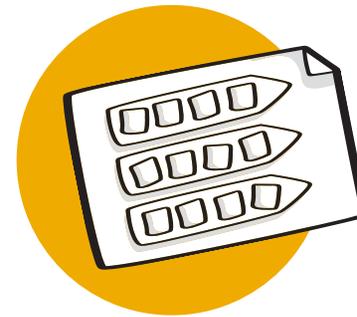
Risk ID	Risk	Initial Risk		Mitigation	Residual Risk	
		Classification	Impact		Classification	Impact
R_001	Low user acceptance	High	Anticipated business improvements are not realized. Growth Strategy is not executed properly	Closely include the users and business stakeholders right from the start. Create clickable low-fidelity prototypes and understand the user journey by applying design thinking tools. Provide user training early and conduct regular education sessions.	Low	Additional effort. There might still be several users who do not accept the solution.

Source: TOGAF Standard, Version 9.2

Solution

Context Diagram

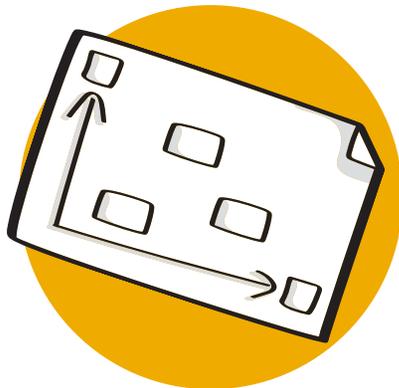
Instructions | Template | Example



Shows the relationship between the proposed solution and the organizational units, business roles, and business functions within the enterprise.

Solution Context Diagram

Shows the relationship of the aspired solution to the organization



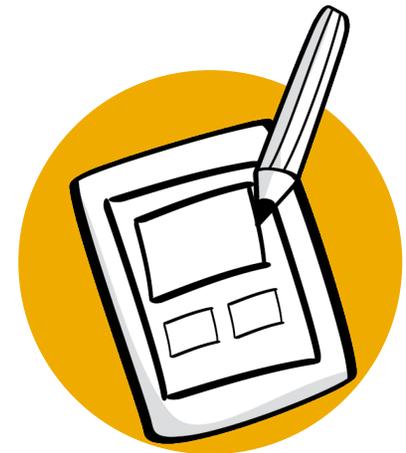
Identify business capabilities

Identify the key objectives, main use-case(s) and business capabilities of the aspired solution.



Capture Business Users

Identify related organizational units, business roles, users and existing business applications.



Visualize solution context

Visualize the aspired solution as one component including relationships to organizational units, business functions and business solutions.

Solution Context

Instructions



Duration
approx. 30-60 minutes



Number of Participants
- **Statement of Architecture Work**
- **Stakeholder Matrix**



Why & What

The goal of the Solution Context is to provide a high-level overview of the aspired solution that can be easily understood by business. Therefore, the Solution Context describes the required *business capabilities* that need to be satisfied by the architecture.

Input for creating the Solution Context are the Statement of Architecture Work and the Stakeholder Matrix.

Specifically, for stakeholders from the business domain, the Solution Context is a good visual representation of the architecture, showing how your anticipated solution interacts with different organizational units, roles and business functions.



How to use it

1. Translate your learnings about the aspired solution into business capabilities, that are describing *what* the aspired solution can do. These can be main functions or features of the aspired solution expressed in business terminology. This list doesn't need to be exhaustive; think of 5 to 10 main capabilities.
2. Identify related organizational units, business roles, and existing business applications. For the identification of users and roles, use the Stakeholder Matrix as input.
3. Visualize the input in a diagram (refer to template).



Tips & Tricks

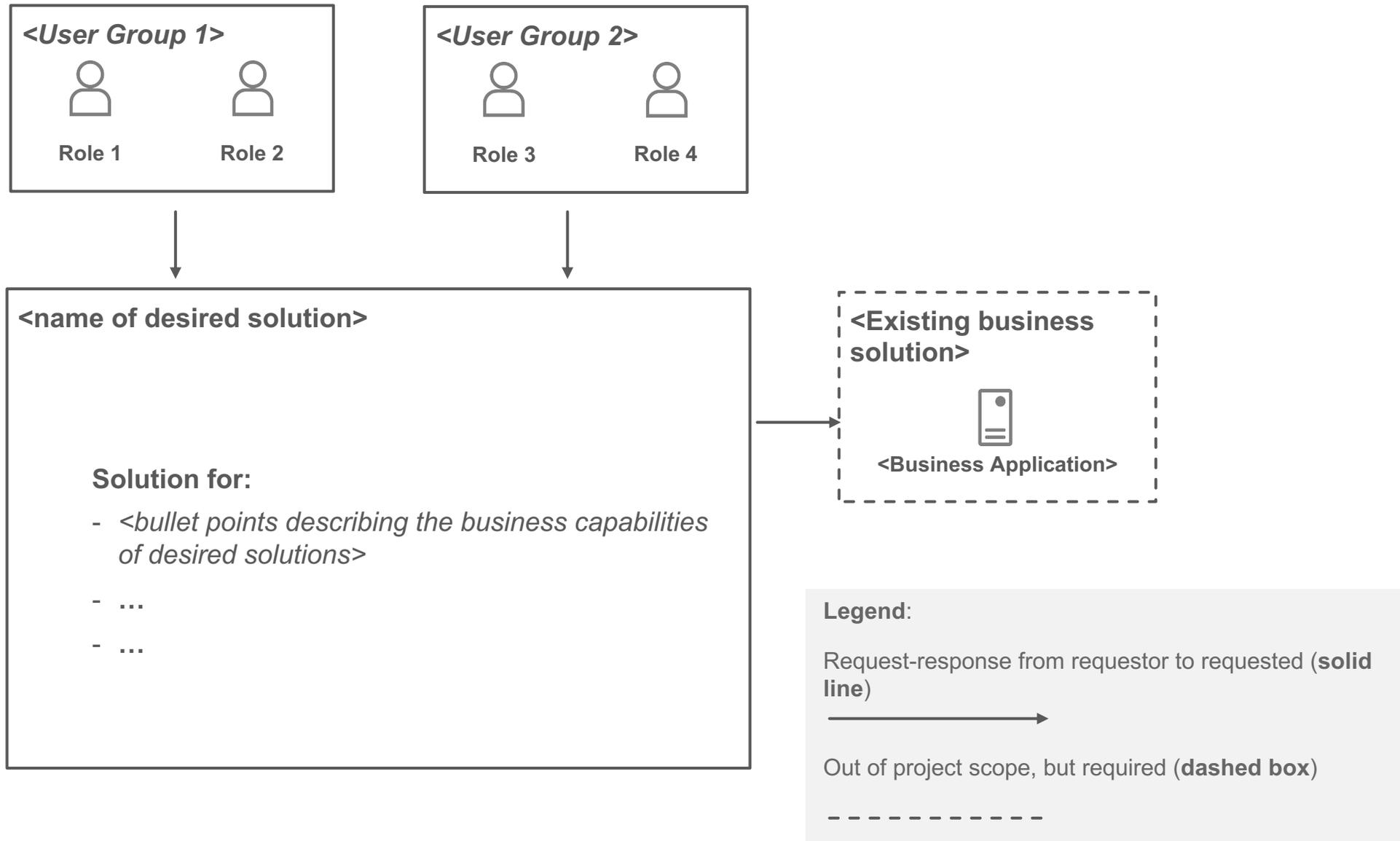
The most prominent part of the Solution Context Diagram is “the box” representing the aspired solution. You label the box with the name you have defined in the Statement of Architecture Work.

Throughout architecture development, you gradually add more details to the Solution Context, i.e., evolving the Solution Context to other work products such as a Solution Concept and a Solution Realization Diagram.

You use the Solution Context to share and communicate your architecture to the business stakeholders. You can also update your Statement of Architecture Work by adding the Solution Context to the “Overview of architecture vision” section of the template.

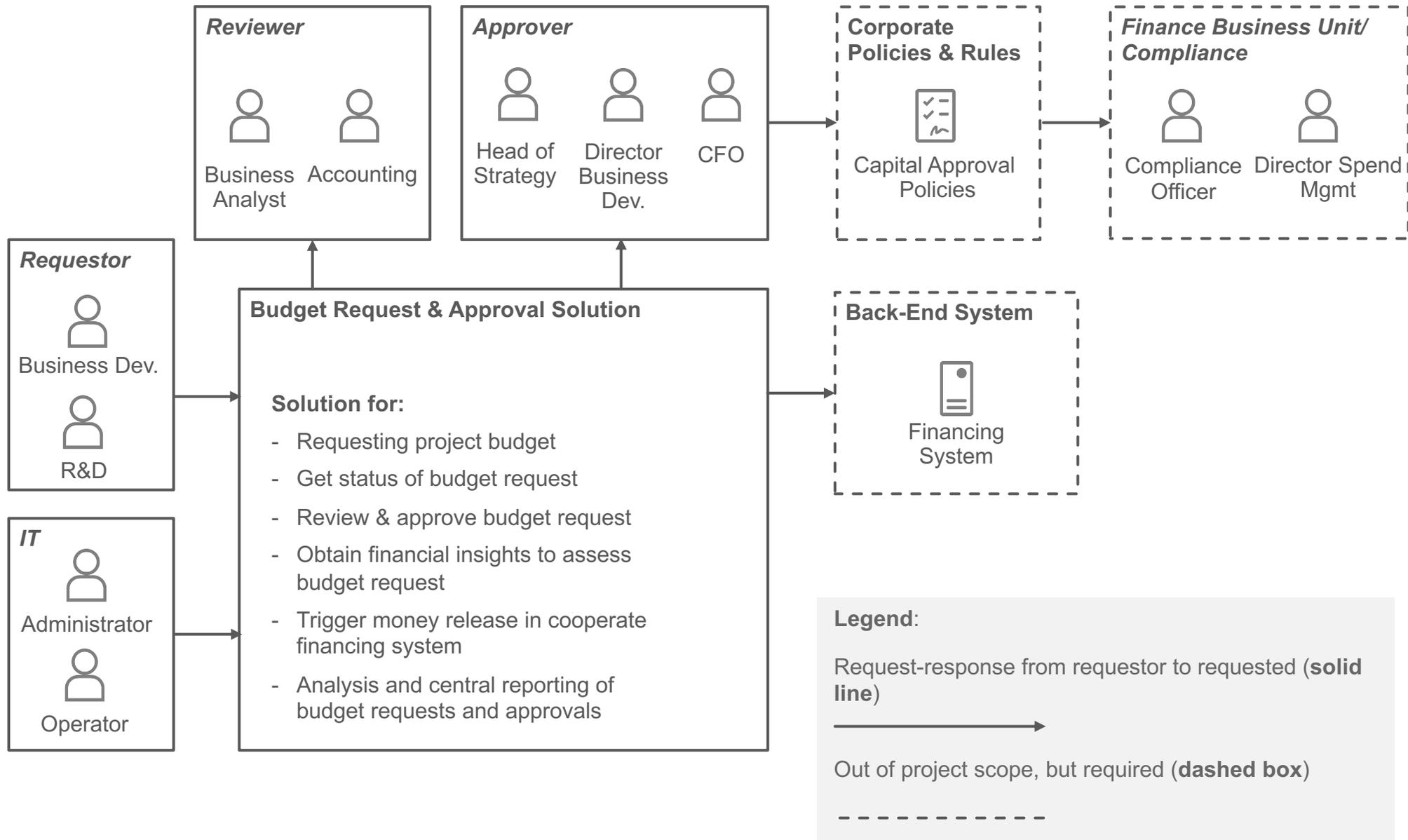
Solution Context Diagram

Template



Solution Context Diagram

Example





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